

## WHAT IS CLAIMED IS:

1. A system for providing financial investment advice, comprising:  
a strategy having at least one trade recommendation;  
a portfolio for defining holdings of an investor based on the at least one trade  
5 recommendation; and  
a strategy client database for permitting the investor to access the at least one  
trade recommendation of the strategy.
2. The system of claim 1, further comprising:  
a risk management utility for allowing the investor to conduct one or more risk  
10 analyses on the strategy.
3. The system of claim 1, wherein the portfolio includes means for weighting the  
strategy.
4. The system of claim 1, further comprising a network permitting an advisor to  
submit the strategy to the exchange.
- 15 5. The system of claim 1, further comprising a search utility for selecting the  
strategy.
6. The system of claim 1, further comprising a network allowing investors to  
access the system.
7. The system of claim 6, wherein the network provides a communication link to a  
20 brokerage account of the investor.
8. The system of claim 1, further comprising at least one brokerage account for  
executing trades based on the holdings of the investor and the at least one trade  
recommendation.
- 25 9. The system of claim 1, further comprising means for distributing the at least one  
trade recommendation to the portfolio at predetermined intervals.

10. The system of claim 1, further comprising a market data source for providing real-time financial instrument prices. *a*

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11. A system, comprising:

means for providing a plurality of advisor strategies for financial investment;  
means for subscribing to at least one of the advisor strategies;  
means for selectively customizing the at least one of the advisor strategies into an investor portfolio; and  
means for generating a plurality of trade recommendations based on the investor portfolio.

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12. The system of claim 11, wherein the at least one of the advisory strategies includes at least one parameter selected from the group consisting of an initial investment amount, a recommended minimum investment, a tradable financial instrument set allowed position types, and restrictions on cash transactions.

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13. The system of claim 11, further comprising:

means for executing a plurality of trade transactions based on the trade recommendations.

14. The system of claim 11, further comprising:

means for updating the advisor strategies at predetermined intervals.

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15. A method of providing investment advice to at least one investor, comprising:

providing at least one advisor strategy accessible by way of a computer network;  
using a strategy client database to maintain a subscription to the at least one advisor strategy for the at least one investor; and  
maintaining a portfolio for the at least one investor, the portfolio defining a plurality of trade recommendations and being based on the at least one advisor strategy.

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16. The method of claim 15, further comprising:

providing the plurality of trade recommendations to a brokerage account.

17. The method of claim 16, further comprising:  
executing a plurality or trades based on the trade recommendations.
18. The method of claim 15, further comprising:  
translating a plurality of strategy trade recommendations into the trade  
recommendations defined by the portfolio.
19. The method of claim 18, further comprising:  
updating the strategy trade recommendations at predetermined intervals.
20. The method of claim 15, further comprising:  
synchronizing information contained in the portfolio with a brokerage account.

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a4

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B1